



CREDIT CARD PURCHASES


Inputting a Credit Card Purchase into EAS

In order to input a credit card purchase into EAS, click on the  icon and select "Purchasing" from the pop-down menu.

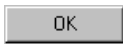
EAS Desktop

Credit card purchases do not require a PROJ (aka Requisition) or Solicitation number. You start with entering a purchase request. To begin, click in the check box near the "Purchase Request" column. Click the  icon on the tool bar or select "File" from the menu bar and choose "New" from the drop-down menu.

New Purchase Request Screen



The image shows a Windows-style dialog box titled "New Purchase Request". It has a blue title bar with a close button (X) on the right. The main area is light gray. At the top, there is a label "Purchase Request:" followed by a text input field containing "XXXX01-12345-00-1001" and a small empty checkbox to its right. Below this, the text "Type: Simplified Acquisition Procedures" is displayed. At the bottom, there are three buttons: "OK", "Cancel", and "Help".

The *New Purchase Request Screen* will appear. Enter the purchase request number according to the procedures of your agency. For purposes of these instructions, the following standard will be used: "XXXXnn-mailcode-FY-nnnn." After entering this number, click the  button. The *Purchase Request Summary Screen* will appear (as shown on the following page).

Purchase Request Summary Screen

PR 6PMF-SMM990032

File Tools Options Gateways Forms Financial

☐ Administration
Purchase For: Bannister Complex
Delivery Date: 12/31/2000 FSC: 7010
Point of Contact: Point of Colact POC Phone: POC Phone

☐ Account Summary
Number Codes: 4 Total Amount: \$30,402.00

☐ Line Items
Total Number: 4 Total Amount: \$30,402.00

☐ Routing
No routing information.

Notes
No procurement notes.

Purchase Request Tab Control Screen

Admin Screen

Purchase Request

Admin Funding Addresses Sources Surcharge


Purchase Type
☒ PR
☐ Credit Card Card No: To Be Assigned
Name:

Administrative Data
Request Date: 10/26/1999 PR Form: Standard
Requesting Office: Project ID:
Point of Contact: Ruth Cummings
POC Phone: (816) 823-2237

Properties
Delivery Date: 12/30/2000 FSC: none Priority: 99
Purpose:

OK Cancel Apply Help

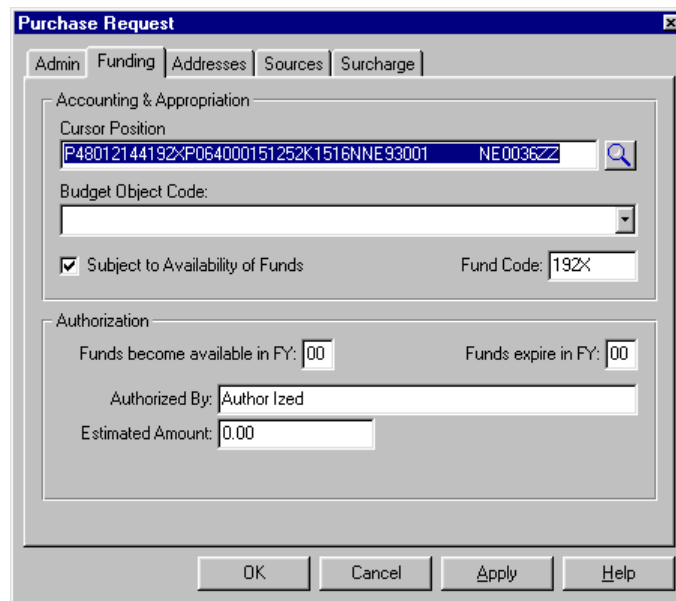
IMPORTANT: You must select the radio button labeled PR in lieu of the IMPAC card radio button. EAS will not allow you to make an Award if you choose "Credit Card."

Appropriation Data:	Enter the appropriate administrative data (request date, request office, POC, and phone).
PR Form:	For PR Form, select “Standard,” which is comparable to <i>GSA Form 49</i> .
Project ID:	You may insert a Project ID code, or you may leave that field blank.
Requesting Office:	Enter your Office Code.
POC Name:	Requisitioner's Name (your name).
POC Phone Number:	Enter Requisition’s Phone Number.
Delivery Date:	Insert the date of delivery and the purpose for the purchase in the fields provided. For the FSC field, use the  icon to research if you do not know the code. Leave Priority at "99."
Purpose:	Brief description of purchase.

When the *Admin Screen* has been completed, click on the  button to save.


Next, click on the second tab entitled “Funding.” The *Funding Screen* will appear.

Funding Screen

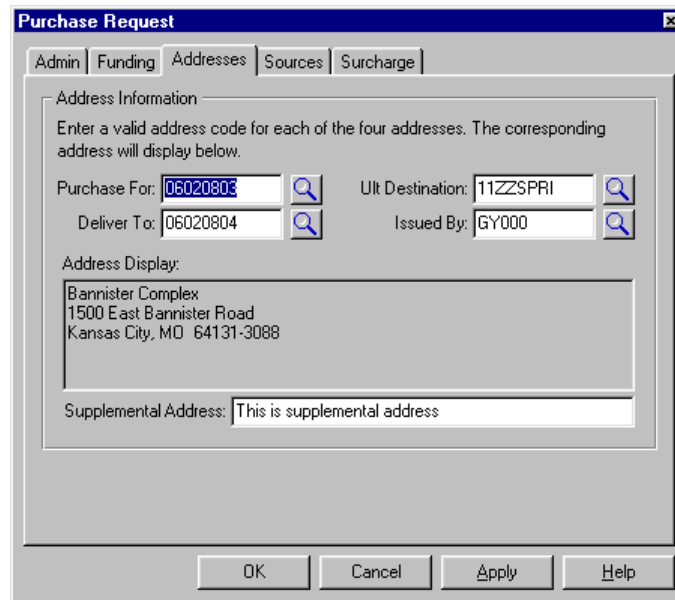



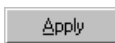
Appropriation Data:	Insert the accounting data if you know it. If not, insert the wording “to be provided at a later date” or “to be assigned.” You cannot leave this field blank.
BOC Code:	Budget Object Code: Leave blank.
Fund Code:	Fund Code: Insert "192X"
FY Funds Available/ FY Funds Expires:	Fill in the FY the funds become available and expire. Fill in the name of the credit card holder in the “Authorized By” field. The “Estimated Amount” of the action should also be inserted.

Authorized By:	Authorizing authority.
Estimated Amount:	Dollar value of purchase.

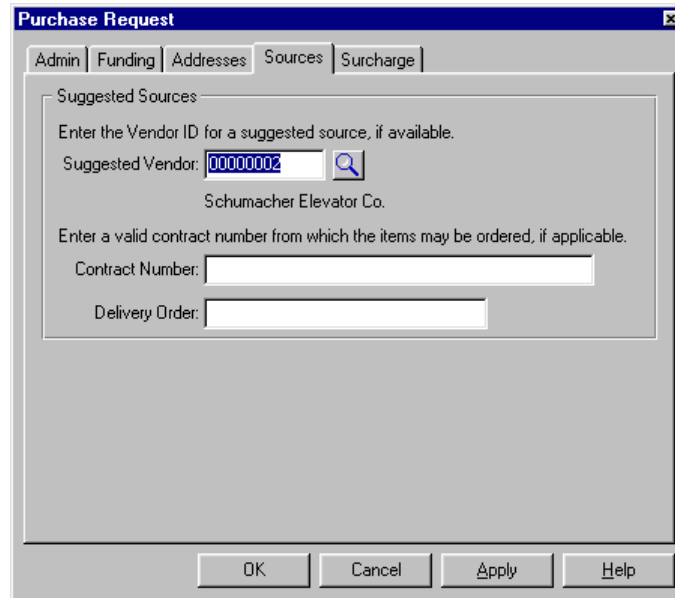
When the *Funding Screen* has been completed, click on the  button to save. Next, click on the third tab entitled “Addresses.” The *Addresses Screen* will appear.

Addresses Screen





Add the addresses code by either typing them in or using the  icon to search for them if unknown. When the *Addresses Screen* has been completed, click on the  button to save.

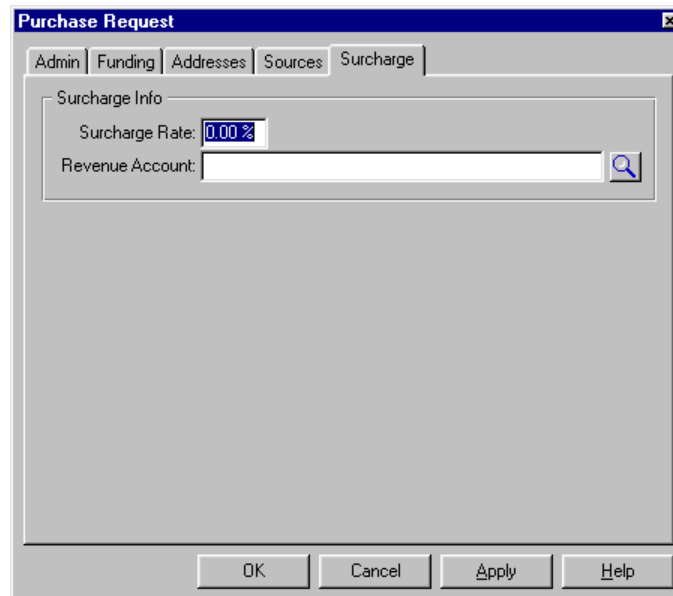
Sources Screen



The screenshot shows a window titled "Purchase Request" with a tabbed interface. The "Sources" tab is selected. Inside the tab, there is a section titled "Suggested Sources". Below this, there is a text prompt: "Enter the Vendor ID for a suggested source, if available." This is followed by a text input field labeled "Suggested Vendor:" containing the text "00000002". To the right of this field is a magnifying glass icon. Below the input field, the text "Schumacher Elevator Co." is displayed. Further down, there is another text prompt: "Enter a valid contract number from which the items may be ordered, if applicable." This is followed by two text input fields: "Contract Number:" and "Delivery Order:". At the bottom of the window, there are four buttons: "OK", "Cancel", "Apply", and "Help".

The *Sources Screen* is optional. If a source is known, you may insert the "Suggested Vendor" or use the  icon to search for and identification number. When finished, click the  button to save.

Surcharges Screen



The screenshot shows the same "Purchase Request" window, but with the "Surcharge" tab selected. Inside the tab, there is a section titled "Surcharge Info". Below this, there is a text prompt: "Surcharge Rate:". To the right of this prompt is a text input field containing "0.00 %". Below this, there is another text prompt: "Revenue Account:". To the right of this prompt is a text input field and a magnifying glass icon. At the bottom of the window, there are four buttons: "OK", "Cancel", "Apply", and "Help".


Fill in the amount of the surcharge or the percentage. Click the  button to save.

PR Summary Screen

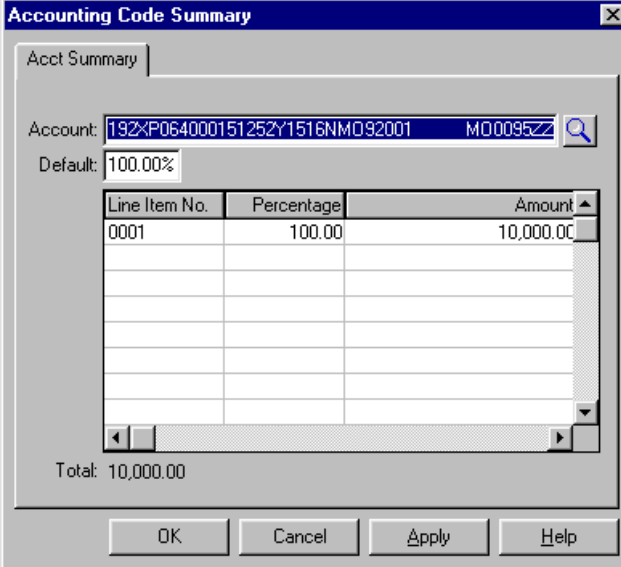
Otherwise, select "Options" from the menu, then choose "Account Summary" from the drop-down menu.

Account Summary Management Browser

Page 6

To begin entering multiple accounting lines, click on the  icon to display the *Accounting Code Summary Screen*.


Accounting Code Summary Screen



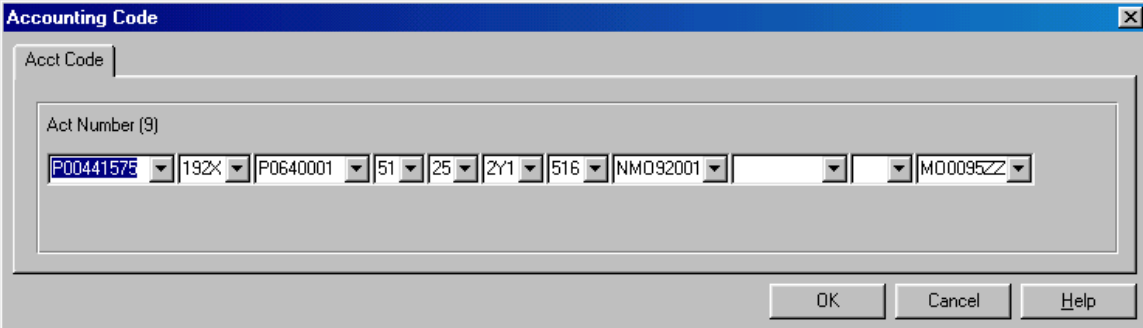
The Accounting Code Summary screen displays a table with columns for Line Item No., Percentage, and Amount. The first row shows Line Item No. 0001, Percentage 100.00, and Amount 10,000.00. The total amount is 10,000.00. The screen includes buttons for OK, Cancel, Apply, and Help.

Line Item No.	Percentage	Amount
0001	100.00	10,000.00


Total: 10,000.00

Click on the  to search for default account lines, or double-click the account line field for a "segmented" view which can be edited by tabbing to the segment desired. To enter a new accounting code or modify an existing code, double-click in the account field area.

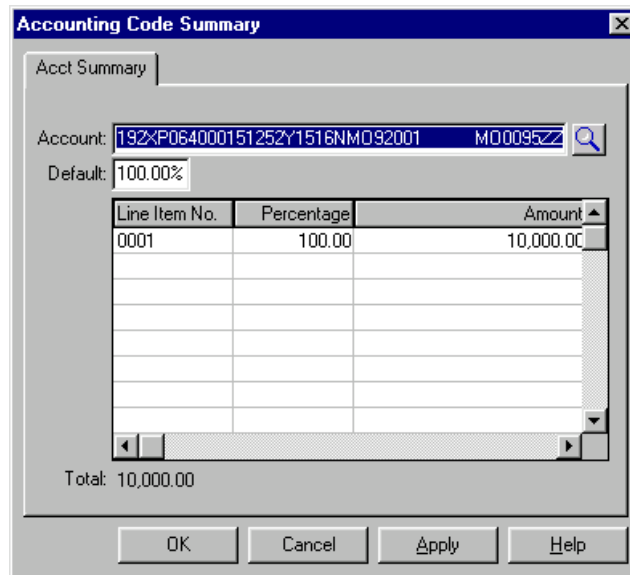
Accounting Code Data Entry Screen



The Accounting Code Data Entry screen displays a form for entering account numbers. The form includes a label 'Act Number (9)' and a series of dropdown menus for entering the account number segments. The segments are: P00441575, 192X, P0640001, 51, 25, 2Y1, 516, NM092001, and M00095ZZ. The screen includes buttons for OK, Cancel, and Help.

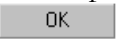
When finished, click the  button to return to the *Accounting Code Summary Screen*.

Accounting Code Summary Screen

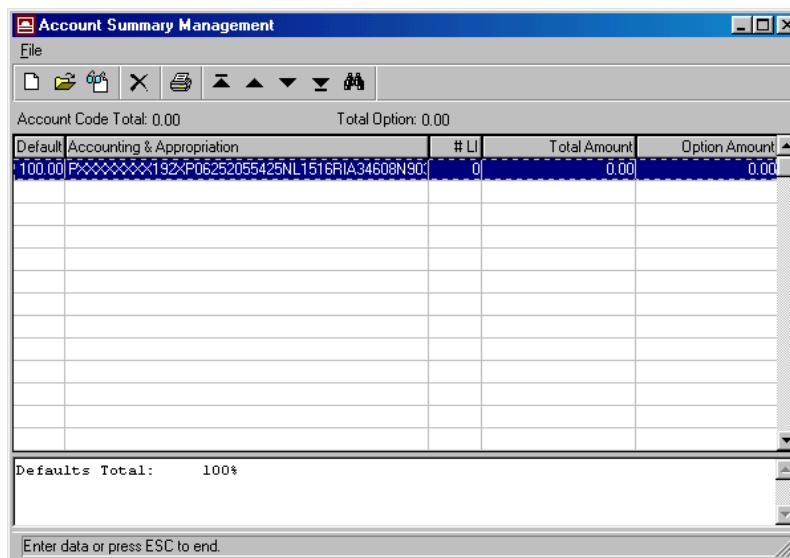


The 'Accounting Code Summary' dialog box has a title bar with a close button. It contains a tab labeled 'Acct Summary'. Below the tab, there is an 'Account:' field with the text '192XP064000151252Y1516NM092001' and a search icon to its right. Below the account field is a 'Default:' field with the text '100.00%'. A table with three columns is present: 'Line Item No.', 'Percentage', and 'Amount'. The first row contains '0001', '100.00', and '10,000.00'. Below the table is a 'Total: 10,000.00' label. At the bottom are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.

Line Item No.	Percentage	Amount
0001	100.00	10,000.00

Press the <Tab> key to the default percentage and enter 100% (or any percentage greater than 0.00% zero). Click the  button and return to the *Account Summary Management Browser*.

Account Summary Management Browser



The 'Account Summary Management Browser' window has a title bar with standard window controls. Below the title bar is a menu bar with 'File'. A toolbar contains icons for file operations. Below the toolbar, it shows 'Account Code Total: 0.00' and 'Total Option: 0.00'. A table with four columns is displayed: 'Default', 'Accounting & Appropriation', '# LI', 'Total Amount', and 'Option Amount'. The first row is highlighted and contains '100.00', 'PXXXXXX192XP06252055425NL1516RIA34608N90', '0', '0.00', and '0.00'. Below the table is a 'Defaults Total: 100%' label. At the bottom is a status bar with the text 'Enter data or press ESC to end.'.

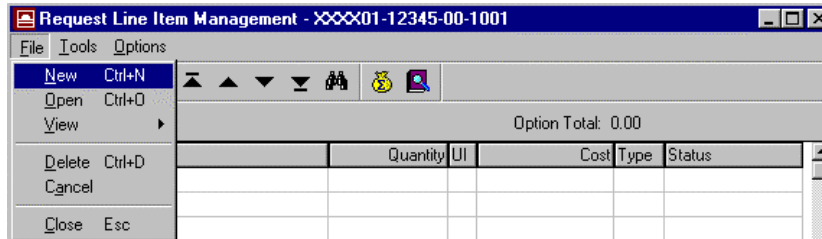
Default	Accounting & Appropriation	# LI	Total Amount	Option Amount
100.00	PXXXXXX192XP06252055425NL1516RIA34608N90	0	0.00	0.00


For additional accounting lines, repeat the above steps. Click the  in the upper right-hand corner to return to the *Customer Requisition Summary Screen*.

Note: (Optional) Click on the box next to the "Account Summary" hypertext link to show that this section is completed. A check will appear.

In order to insert money to any action in EAS, you must have at least one line item. To create a line item, click on the "Line Item" hypertext link. The *Request Line Item Management Browser* will appear.

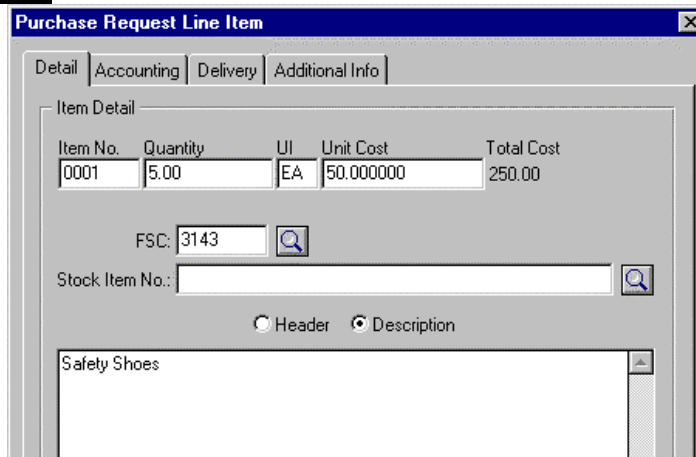
Request Line Item Management Browser



To create a line item, click on the  icon. Or select "File" from the menu bar, then choose "New" from the drop-down menu. In either case, The *Purchase Request Line Item Tab Control Screen* will appear. The first tabbed screen (*Detail*) defaults.

Purchase Request Line Item Tab Control Screen

Detail Screen



QTY, UI, and Unit Cost:	Enter the applicable fields (quantity, unit of issue, and unit cost).
FSC Code:	The FSC code is copied from the <i>Admin Screen</i> .
Description:	To enter a description, make sure the radio button is checked. Then, type in the appropriate description in the blocked area. In this example, the line item description is "Safety Shoes."


Accounting Screen


The screenshot shows the 'Purchase Request Line Item' window with the 'Accounting' tab selected. The window has four tabs: 'Detail', 'Accounting', 'Delivery', and 'Additional Info'. The 'Accounting & Appropriation' section displays 'Line Item Cost: 1,681.00' and a 'Fund Code' field. Below this is a table of 'Account Lines' with columns for 'Cost', 'Pct', 'BOC', and 'Account Code'. The table contains three rows of data. Below the table, it shows 'Total Cost: 1,681.00' and 'Total Percent: 100.00 %'. The 'Change Account Line' section includes a 'Cursor Position' field, 'New' and 'Delete' buttons, an 'Account' field with the value 'P98712348192x', a 'BOC' dropdown menu, and a 'Percent' field with the value '37.18'. It also shows 'Cost: 624.995800' and radio buttons for 'Cost' and 'Percent'. At the bottom are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Cost	Pct	BOC	Account Code
624.9958	37.18		P98712348192x
508.1663	30.23		P98574132192x
547.8379	32.59		P12345678192x

Any accounting data entered in the earlier stage will be displayed.


To bring accounting data forward, click on the “*New*” button. Any data previously entered will appear.

In order to calculate, insert 100% in the percent field. Click the  button. The cost should appear in the “*Total Cost*” and “*Cost*” areas.

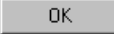

When the *Accounting Screen* has been completed, click on the  button to save. Next, click on the third tab entitled *Delivery*, and the *Delivery Screen* will appear.

Delivery Screen

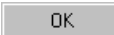

The screenshot shows a software window titled "Purchase Request Line Item" with a close button (X) in the top right corner. Below the title bar are four tabs: "Detail", "Accounting", "Delivery" (which is selected), and "Additional Info". The "Delivery" tab contains a "Shipping Information" section. This section includes a "Delivery Date" field with the value "11/29/97", a "Deliver To" field with the value "gsa" and a magnifying glass icon, and an "Address Display" section with a large text area containing the text "INPUT THE APPROPRIATE CORRESPONDENCE SYMBOL IN THE ADDRESS CODE FIELD". To the right of the "Deliver To" field are three radio buttons for "FOB Designation": "Origin", "Destination" (which is selected), and "See Schedule". At the bottom right of the "Shipping Information" section is a "Priority" field with the value "99". Below this is a "Supplemental Address" field.

The data in these fields defaults from information previously entered. Review it for accuracy and click the  button to save.

NOTE: *The fourth tab entitled "Additional Info" is optional. You would only visit this screen if you intend to attach any documents to this action. Most credit card purchase actions will not be printed. They are being entered into the system in order for GSA to capture the number of actions and dollars.*

At this point, click the  button to return to the *Request Line Item Management Screen*. Click  at the upper right-hand corner of the screen and you'll return to the *Purchase Request Summary Screen*.

Printing the GSA 49

If you desire to print the *GSA 49*, you can do so by selecting "File," then "Print." A *Print Preview Screen* will appear. To print, click "Print" from the top of the screen. Fill out the print option pop-up menu as needed, and click the  button to print. When done, click the  at the top right-hand corner of screen.

At this point, you're ready to award this action. At the *PR Summary Screen*, click "Close" to return to the *Purchasing Worksheet*.


Purchasing Worksheet

The screenshot shows a software window titled "Purchasing Worksheet". The menu bar includes "File", "Tools", "Options", and "Reports". The toolbar contains icons for file operations (new, open, save), navigation (back, forward, home), and printing. A dropdown menu labeled "Current Procurement" is set to "Purchase Request". Below this is a table with five columns: "Project", "Purchase Request", "Solicitation", "M", and "Award". The first row of the table has the value "6PMF-SMM990032" under the "Purchase Request" column. At the bottom of the window, there are labels for "Status:", "Folder:", and "Notes:". The status is "Open-Assign", the folder is "AA New Work", and the notes field is empty. A footer bar at the very bottom says "Enter data or press ESC to end."

<input type="checkbox"/> Project	<input type="checkbox"/> Purchase Request	<input type="checkbox"/> Solicitation	M	<input checked="" type="checkbox"/> Award
	6PMF-SMM990032			

Status: Open-Assign
Folder: AA New Work
Notes:

Enter data or press ESC to end.


Click the check box near the Award column. Click the  icon. Or, select “File” from the menu bar, then choose “New” from the drop-down menu to display the *Award Type Screen*.

Award Type Screen

Award Type

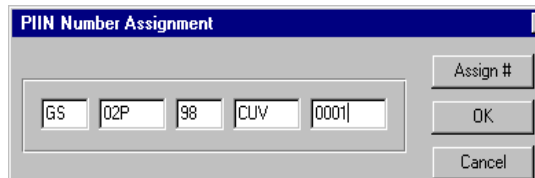
- Priced PO
- Unpriced PO
- Agreement
- Priced BOA
- Unpriced BOA
- DO Local
- DO Other Agency
- BPA Call
- Imprest Fund
- Credit Card**
- SF44

OK Cancel


When the *Award Type Screen* appears, select “Credit Card” and click the  button.

The *PIIN Number Assignment Screen* appears.

PIIN Number Assignment Screen

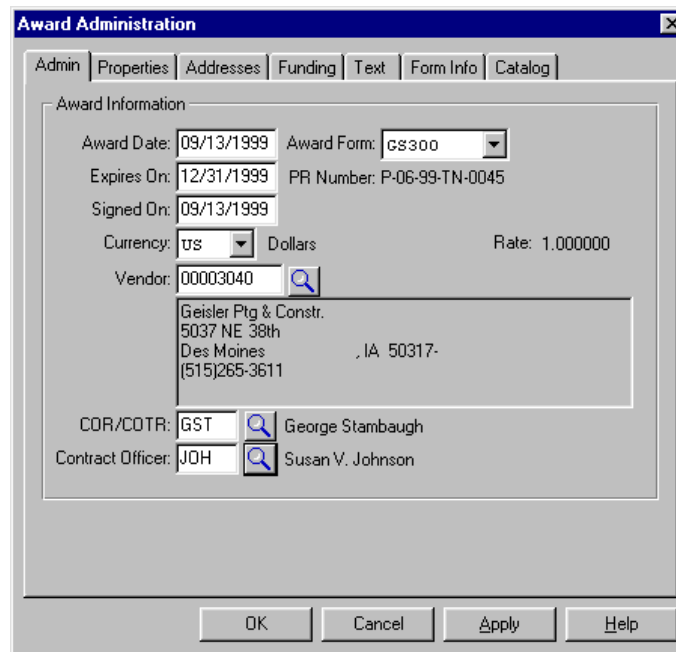


The dialog box titled "PIIN Number Assignment" contains five input fields with the following values: "GS", "02P", "98", "CUV", and "0001". To the right of these fields are three buttons: "Assign #", "OK", and "Cancel".

Make sure that the tenth position is the letter "V." This is the proper coding for all credit card purchases. Click the "Assign #" button to allow the system to generate the next available last four digits. Then click the  button. The *Award Administration Screen* will appear with the first screen *Admin* shown on the following page.

Award Administration Tab Control Screen


Admin Screen

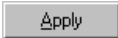



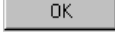
The "Award Administration" window has a tab control with tabs for "Admin", "Properties", "Addresses", "Funding", "Text", "Form Info", and "Catalog". The "Admin" tab is selected, showing the "Award Information" section. Fields include: "Award Date" (09/13/1999), "Award Form" (GSA300), "Expires On" (12/31/1999), "PR Number" (P-06-99-TN-0045), "Signed On" (09/13/1999), "Currency" (USD), "Rate" (1.000000), and "Vendor" (00003040). A text box shows vendor details: "Geisler Ptg & Constr. 5037 NE 38th Des Moines, IA 50317 (515)265-3611". Below are "COR/COTR" (GST) and "Contract Officer" (JOH) fields, each with a search icon and a name (George Stambaugh and Susan V. Johnson respectively). At the bottom are "OK", "Cancel", "Apply", and "Help" buttons.

The *Admin Screen* includes award information for the Credit Card Purchase. Complete the fields as follows, pressing the <Tab> key to move from field to field:

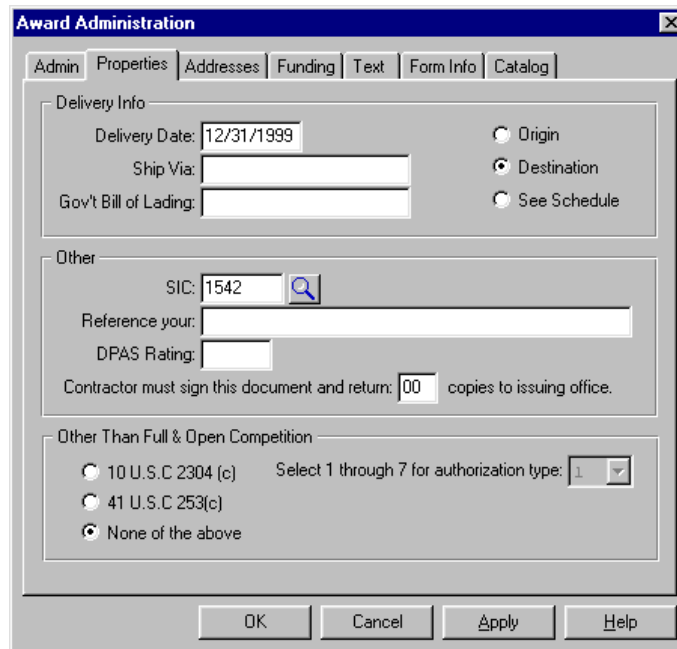
Award Date:	The system defaults to the current date. The user may enter an alternative date.
Award Form:	Click on the down arrow and select the <i>GSA 300</i> form.
Expires On:	Enter the order delivery/completion date.
Signed On:	Enter the date that the Contracting Officer signs the order (can also be the award date).

Currency:	The system defaults to "US"; however, changes may be made.
Vendor:	Vendor information is pulled from the base contract.
COR/COTR:	Enter the 3-digit User ID or click on the spy glass to the right and select from the COR/COTR list, press the  button to return to the <i>Admin Screen</i> .
Contract Officer:	Enter the 3-digit User ID or click on the spy glass as described in COR/COTR instructions above.

The user may utilize the  button at the bottom of each tabbed screen or click the  button after the completion of all screen tabs to save.

NOTE: Do not choose the  button until the required order information is entered in all the tabbed screens.

Properties Screen



Click on the "Properties" tab. Complete the fields as follows, pressing the <Tab> key to move from field to field:

Delivery Date:	The system defaults to the delivery date from the Procurement Request. Make any changes necessary.
----------------	--

Origin, Destination, See Schedule:	The system defaults to the "Destination" radio button; change if necessary.
Ship Via:	N/A
Govt Bill of Lading:	N/A
SIC:	Enter the appropriate Standard Industrial Classification (SIC) Code. User may use spy glass lookup icon if SIC is unknown.
Reference your:	Enter the date of quote and reference no., if applicable.
DPAS Rating:	N/A
No. Of Copies:	Enter the number of signed copies that shall be returned to the issuing office, if applicable.
Other Than Full & Open Competition:	System defaults to "None of the above." For GSA select the radio button for 41 U. S. C. 253(c), then Click on the drop down arrow to select the proper authority, if applicable.

Addresses Screen

Click on the "Addresses" tab. Complete the fields as follows, pressing the <Tab> key to move from field to field:

Issued by:	Insert address code or correspondence symbol as appropriate (prints in Block 11 of the <i>GSA 300</i>).
Deliver to:	Enter the building number where the services/supplies will be delivered (prints in Block 13 of the <i>GSA 300</i>).
Payment Made By:	N/A, information does not print on the <i>GSA 300</i> .

Administered By:	Enter the correspondence symbol of the administering office (prints in Block 15 of the <i>GSA 300</i>).
Place of Inspection:	Enter the location where the goods or services will be inspected/accepted (prints in Block 14 of <i>GSA 300</i>).
Place of Acceptance:	N/A, information does not print of the <i>GSA 300</i> .
Receiving Office:	Enter name, correspondence symbol, and telephone no. (prints in Block 21 of <i>GSA 300</i>).

NOTE: If address information fields were previously entered in the My Profile Screen (available from the EAS Desktop, when you choose "Options" from the menu bar, then select "Preferences" and "My Profile" from the drop-down menus). Otherwise they default as blank fields.

Funding Screen

Click on the "Funding" tab. Review the Accounting & Appropriation data for accuracy if previously completed during the Requisition/Procurement Request stage. If not entered, complete the fields as follows, pressing the <Tab> key to move from field to field:





Accounting & Appropriation:	Review/enter the correct appropriation data for the delivery/task order (prints in Blocks 4 & 5 of <i>GSA 300</i>).
BOC:	N/A.
Payments Subject to Availability of Funds:	Check this block if the contract will be chargeable to funds of the new fiscal year and the contract action is being initiated before funds are available (reference FAR Clause 52.232-18).

Subject to Fast Payment Procedures:	N/A, per GSAM 513.301.
Subject to Prompt Payment Act:	This block is mandatory and should always be checked (reference FAR Clause 52.232-25).
Days for Govt constructive acceptance:	System defaults as "007," may be edited.
Invoice To:	Enter correspondence symbol or type address where invoice is to be mailed (prints in Block 24 of <i>GSA 300</i>).
Copies:	Defaults to "1," may be edited.
Vendor Discounts:	This information all defaults from the Vendor File.

Text Screen

Click on the "Text" tab. Complete the fields by pressing the <Tab> key to move from field to field.

In the first block, enter any special comments/notations to be printed before the line items. A right mouse click in this block provides the capability to load a 2000 character file. (This text block allows also help, spellcheck, undo, and dump with the right mouse click.)

The second block allows a referenced document to print after the line items. Enter the path of the text/doc file or use the Browse button to locate one. A document that already exists in a shared directory can be located by pressing the "Browse" button. Highlight your document and press the  button and your document name will display in this field. The  button is used to edit an already existing document in MS Word. For example, after finding a document using the "Browse" button, that same document can be edited by pressing the  button. The  button will automatically bring up MS

Word. The **Template** button will enable you to create a form for entering repetitive information specific to any contract.

Form Info Screen and *Catalog Screen* are not applicable for the *GSA 300*.

Press the **OK** button, EAS will now save all information entered in all of the tabs. EAS will automatically return to the *Award Summary Screen*.


It is time to revisit the *Line Item Screen* by clicking on the "Line Item" hypertext link. The *Award Line Item Management Browser* will once again appear.

Award Line Item Management Browser

No.	Description	Quantity	UI	Cost	Type	Status
0001	Supv Hr - momthly for 15 month	82.00	HR	20.50	BPRI	Full Award
0002	Non-Supv hours - 15 months - r	1,600.00	HR	8.45	BPRI	Full Award
0003	Supv Hr - momthly for 15 month	82.00	HR	20.50	OPRI	Full Award
0004	Non-Supv hours - 15 months - r	1,600.00	HR	8.45	OPRI	Full Award

Description : Supv Hr - momthly for 15 months - recurring

Enter data or press ESC to end.

Review this sheet for accuracy. Ensure that the Status column reads “Full Award.” If everything is correct, close the window. If you need to make any changes to your action, click the  icon and the *Award Line Item Tab Control Screen* will appear.

Award Line Item Tab Control Screen

Detail Screen

Award Line Item

Detail | Accounting | Delivery | Additional Info

Item Detail

Item No.	Quantity	UI	Unit Cost	Total Cost
0001	5.00	EA	50.000000	250.00

FSC: 3143

Stock Item No.:

☐ Header ☒ Description

Safety Shoes

▲ ▼ OK Cancel Apply Help


The first screen is the *Detail Screen*. Make any necessary revisions and then click the button. Click on the second, third, and fourth tabs, making any revisions to the *Accounting*, *Delivery*, and *Additional Info Screens*, respectively, as needed. Remember to click the button after visiting each screen. When all four screens are completed, click the button to return to the *Award Line Item Management Browser*. Repeat this process for any other line items that need revision.

Then close the window, and the *Award Obligation Tab Control Screen* will appear.

Award Obligation Tab Control Screen

Obligation Screen

The screenshot shows a window titled "Award Obligation" with a tab control at the top. The "Obligation" tab is selected. The "Award Total" section contains the following information:

- Currency: US Dollars
- Rate: 1.000000
- Line Item Total: 250.00
- Award Total: 250.00 (Includes Other Totals)
- US \$ Total: 250.00
- Obligated Amount: 250.00
- Contract Officer: TR4  deskguide

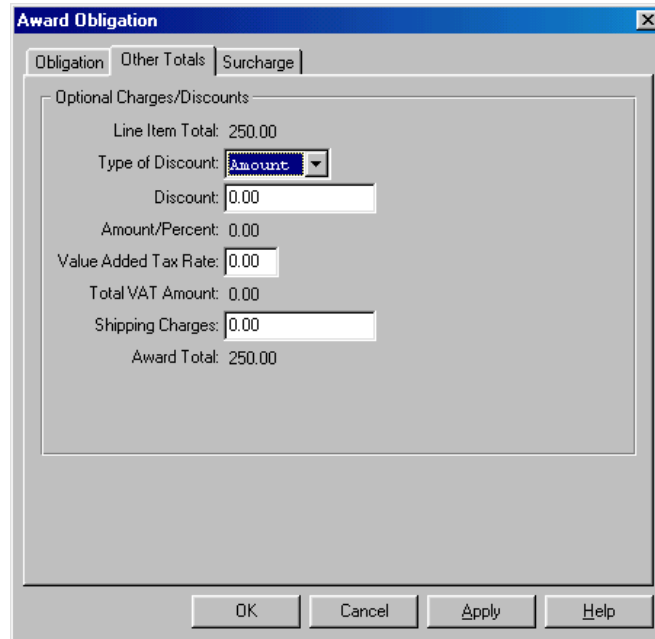
At the bottom of the window are four buttons: OK, Cancel, Apply, and Help.

The line item and award total copies from the previous screen. The "Obligated Amount" field will be at "\$ 0.00." To obligate the entire amount of the action, type in the amount. In this example it's "\$250.00."

Enter the Contracting Officer's three-digit code or use the  icon if unknown.

When corrections to the *Obligation Screen* are done, click the  button.

Other Totals Screen



The screenshot shows a software window titled "Award Obligation" with three tabs: "Obligation", "Other Totals", and "Surcharge". The "Other Totals" tab is selected. Inside the tab, there is a section titled "Optional Charges/Discounts". This section contains several input fields and labels: "Line Item Total: 250.00", "Type of Discount:" with a dropdown menu showing "Amount", "Discount:" with a text box containing "0.00", "Amount/Percent: 0.00", "Value Added Tax Rate:" with a text box containing "0.00", "Total VAT Amount: 0.00", "Shipping Charges:" with a text box containing "0.00", and "Award Total: 250.00". At the bottom of the window, there are four buttons: "OK", "Cancel", "Apply", and "Help".

Click on the *Other Totals* tab if you have any discount or shipping charges associated with this action and enter that information.

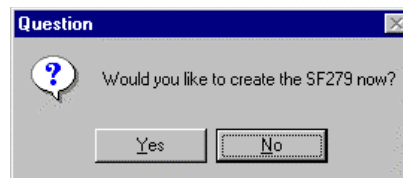
Click the  button when done.

Reporting of Credit Card Purchases

The reporting procedures for credit cards vary depending upon the nature and dollar amount of the item(s) being purchased. Listed below are the different circumstances.

If your action is \$2,500 or below, a *Question Dialog Box* will appear asking if you want to create an *SF 279*.

Question Dialog Box



The screenshot shows a small dialog box titled "Question". It contains a question mark icon in a speech bubble and the text "Would you like to create the SF279 now?". At the bottom, there are two buttons: "Yes" and "No".

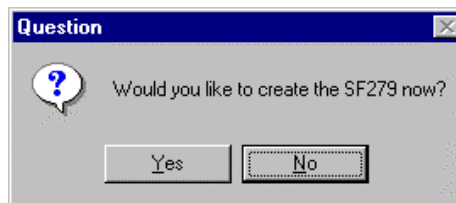
Select "Yes," if the action is

- under \$500.00.
- construction \$2,000 or over.
- a service \$2,500 or over.

Select "No," if the action is *SBCDP and \$500 or over.

If your action is \$2,501–\$25,000, a *Question Dialog Box* will appear asking if you want to create an SF 279.

Question Dialog Box



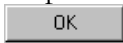

Choose "Yes," if the action is

- a service \$2,500.
- construction \$2,000 or over
- *SBCDP and \$500 or over.

If your action is \$25,000 or over, the SF 279 will automatically appear.

*NOTE: Block # 9 of the SF 279 should be coded "D" for all credit card actions.
SBCDP — Small Business Competitiveness Demonstration Program.

Printing the action is not recommended. As mentioned, the reason for inputting credit card actions into the EAS system is to allow GSA to capture the number and dollar amount of these actions. However, if you want to print the action, return to the *Award Summary Screen* and complete the following steps.

To print, click "Print" from the menu bar at the top of the screen. Choose the print option you want from the pop-up menu and click the  button to print. When done, click the  icon at the top right-hand corner of the screen.

Creating an SF 279

SF 279 Tab Control Screen

From the *Award Summary Screen*, click on the blue hypertext "FPDS" link. The SF 279 screen will appear.

It is good practice to have the SF 279 for the base contract handy when you are completing these screens. EAS automatically fills in any numbers that are "skipped." Be sure to press the <Tab> key between screens so that your numbers will be entered into the system.

Screen 1–8

The screenshot shows the SF279 screen with a tab control at the top. The tabs are: 1 To 8, 9 To 16, 17 To 23, 24 To 31, 32 To 33, 34 To 41, 42 To 49, and Reports. The 1 To 8 tab is selected. The screen contains the following fields:

- 1. Reporting Agency Code: 4740
- 2. Contract Number: GS06P00CUM0046
- 3. Modification Number: (empty)
- 4. Contracting Office Order Number: (empty)
- 5. Contracting Office Code: 6ADB (with a search icon)
- 6. Action Date: 11/03/1999
- 7. Type of Data Entry: A. Original (dropdown menu)
- 8. Report Period: 20001

At the bottom are buttons for OK, Cancel, Apply, and Help.

Screen Number	Description	Contents
1	Reporting Agency Code	EAS defaults to 4740, the FPDS (Federal Procurement Data System) agency GSA/PBS identifier. (The code is actually 4740.4740).
2	Contract Number	EAS defaults to the number assigned at Award.
3	Modification Number	EAS defaults to the Modification number issued against the contract (if any).
4	Contracting Office Order Number	EAS defaults to the number issued against the contract.
5	Contracting Office Code	EAS supplies a default code. Enter the appropriate Contracting Office Code if it is different from the default. This number uniquely identifies the purchasing or contracting office.
6	Action Date	EAS pulls this date forward from the <i>Award Screen</i> .

Screen Number	Description	Contents
7	Type of Data Entry	This field indicates the type of <i>SF 279</i> being reported. EAS defaults to “A” for original (an action not previously reported to the FPDS). However, if this is not an original <i>SF 279</i> , change to the correct code. Your other choices include: B – Deleting (for deleting a previously reported action to the FPDS) C – Correctly (for correcting a previously reported action)
8	Report Period	EAS defaults to the year and quarter the report was submitted, usually the current fiscal year and quarter. Do not change.

When you have finished entering the data on this screen, click on the next tab at the top of the box to view *Screen 9–16*.

Screen 9–16

SF279

1 To 8 | **9 To 16** | 17 To 23 | 24 To 31 | 32 To 33 | 34 To 41 | 42 To 49 | Reports

9. Kind of Contract Action: D. Purchase Orders/BPA Call

10. Dollars Obligated or Deobligated: 00000003

11. Type of Obligation: A. Obligated

12. Principal Product or Service: none

13. SIC Code: 5045

14. Commercial Item Acquisition: Yes

15. Contractor Name: Davdan Products, Inc.

16. Contractor Identification Number: 049856115

OK Cancel Apply Help

Field Number	Description	Contents
9	Kind of Contract Action	Enter the appropriate code from the following choices (usually H): D — <i>Small Purchase Procedure</i> . Use when an action is a small purchase procedure pursuant to <i>FAR Part 13</i> . Modifications to small purchases shall be reported as H. F — <i>Order under Basic Ordering Agreement (BOA)</i> . Use when an action is an order under a BOA. G — <i>Order/Modification under Federal Schedule</i> . Use when action is an Order, Modification to an order, or Termination of an order under a Federal Schedule contract. H — <i>Modification</i> . Use when the action is a modification to an existing Letter Contract, Definitive Contract, or Order (except for a modification to an order under a Federal Schedule contract, which shall be reported under G). K — <i>Termination for Convenience</i> . Use when an action is a modification to Termination for Convenience (except when an action IS a modification). L — <i>Order Under Multiple Award Contract</i> . Use when an action is a delivery order against a multiple award contract.
10	Dollars Obligated (or Deobligated)	CAUTION: EAS may erroneously display the total Contract obligated amount instead of the modification "Obligated Amount." Enter the total modification "Obligated Amount" in 1,000s of dollars, rounded to the nearest thousand. (For example, if the modification decreased the contract price by \$35,850.00, enter 00000036.) Note that even though the mod was a deobligation, only POSITIVE numbers may be entered in Block 10 of the <i>SF 279</i> . Indicate a deobligation by choosing "B. Deobligated" in block 11 below. (\$0.00 for Admin mods)
11	Type of Obligation	EAS defaults to A for "Obligated" (action obligates dollars). The only other choice is B for "Deobligated." Change to B if the action deobligates dollars.
12	Principal Product or Service	See corresponding blocks on the <i>SF 279</i> for the base contract, or enter the four-digit code from the <i>FPDS Product and Services Code Manual</i> . DO NOT LEAVE BLANK.
13	SIC Code	Enter the Standard Industrial Classification (SIC) Code that applies to the type of work being performed. (See corresponding blocks on the <i>SF 279</i> for the base contract.) DO NOT LEAVE BLANK.
14	Commercial Item Acquisition	Your choices are Y for "Yes" or N for "No." Defaults from the base award.
15	Contractor Name	EAS defaults to the previously entered name.
16	Contractor Identification Number	EAS pulls the Dun & Bradstreet (DUNS) number from the contractor vendor file (master bidders' list). DO NOT LEAVE BLANK.

When you have finished entering the data on this screen, click on the next tab at the top of

the screen to view *Screen 17–23*.

Screen 17–23

Field Number	Description	Contents
17a	Principal Place of Performance	Report the FIPS code of the city, state, foreign country, or government installation where the items are produced, manufactured, mined, or grown or the service would be performed. (See Block 17 of the <i>SF 279</i> for the base contract.) <i>Do not use two-letter postal abbreviations.</i> For construction or A/E contracts, report the construction site location. FIPS codes can be found on the Internet at http://web1.whs.osd.mil/PEIDHOME/FIPSquery.htm . DO NOT LEAVE BLANK.
17b	Foreign Country Code	Use, if applicable. In most cases, however, this field will be blank.
18	Foreign govt or International Orgn.	Use, if applicable. In most cases, however, this field will be “No.”
19	Tariff or regulated	Use, if applicable. In most cases, however, this field will be blank.
20	Reserved	Leave Blank
21	Bundling of Contract Requirements	Defaults to No.
22	Country of Manufacture	EAS defaults to U.S.

Field Number	Description	Contents
23	Synopsis of Procurement	Report based on the <i>CBD</i> synopsis required of <i>FEAR</i> 5.2. Choose from: A — Synopsized prior to Award B — Not Synopsized because of Urgency C — Not Synopsized for other Reason

When you have finished entering the data on this screen, click on the next tab at the top of the screen to view *Screen 24-31*.

Screen 24–31

The screenshot shows a window titled "SF279" with a tabbed interface. The "24 To 31" tab is selected. The form contains the following fields:

- 24. Type of Contract or Modification: A dropdown menu with a blue bar.
- 25. CICA Applicability: A dropdown menu.
- 26. Solicitation Procedures: A dropdown menu.
- 27. Authority Other Than Full and Open Competition: A dropdown menu.
- 28. Number of Offers Received: A dropdown menu.
- 29. Extent Competed: A dropdown menu.
- 30. Type of Contractor: A dropdown menu with the text "B. Other Small Business".
- 31. Women-Owned Business: A dropdown menu with the text "No".

At the bottom of the window are four buttons: "OK", "Cancel", "Apply", and "Help".

Field Number	Description	Contents
24	Type of Contract or Modification	Report code that represents the predominance of dollars obligated or deobligated. A — Fixed-Price Redetermination J — Fixed-Price K — Fixed-Price with Economic Price Adjustment L — Fixed-Price Incentive R — Cost-Plus Award Fee S — Cost-No Fee T — Cost-Sharing U — Cost-Plus-Fixed Fee V — Cost-Plus-Incentive Y — Time and Materials Z — Labor Hours

Field Number	Description	Contents
25	CICA Applicable	<p>Enter the appropriate codes from the following:</p> <p>A. <i>CICA Applicable</i> — Use if the action resulted from a Solicitation issued on or after April 1, 1985, and Code B or C does not apply.</p> <p>B. <i>Purchase Orders/BPA Calls Using Small Purchase Procedures</i> — Use if the action is a purchase order or BPA calls.</p> <p>C. <i>Subject to Statute Other than CICA</i> — Use if specific legislation authorizes agency to use procurement procedures not covered by the CICA statute, and only if the agency notifies FPDC in advance that this code is authorized.</p> <p>D. <i>Pre-CICA</i> — Use if the action resulted from Solicitations issued before April 1, 1985.</p> <p>E. <i>Commercial Items Acquisition</i> — Use if the action resulted from Solicitations issued using <i>FAR, Part 12</i>. DO NOT LEAVE BLANK.</p>
26	Solicitation Procedures	<p>Choose from the following:</p> <p>A. Full and Open Competition — Sealed Bid</p> <p>B. Full and Open Competition — Competitive Proposal</p> <p>C. Full and Open Competition — Combination</p> <p>D. <i>Architect/Engineer</i> — Use if the action resulted from selection of sources for A/E contracts.</p> <p>E. <i>Basic Research</i> — Use if the action resulted from competitive selection of basic research proposals.</p> <p>F. <i>Multiple Award Schedule</i> — Use if the action is for award of a multiple award schedule or an order against a multiple award schedule.</p> <p>G. <i>Alternate Source-Reduced Cost</i> — Use if the action resulted from use of procedures to reduce overall costs pursuant to <i>FAR 6.202(a)(1)</i>.</p> <p>J. <i>Alternate Source-Engineer, R&D Capability</i> — Use if the action resulted from use of procedures for establishing or maintaining an essential engineering, research, or development capability pursuant to <i>FAR 6.202(a)(3)</i>.</p> <p>K. <i>Set Aside</i> — Use if the action resulted from use of procedures for set asides pursuant to <i>FAR 6.203</i>, competed 8(a) awards, and sole source 8(a) awards.</p> <p>L. Other Than Full and Open Competition.</p> <p>DO NOT LEAVE BLANK.</p>

Field Number	Description	Contents
27	Authority Other Than Full and Open Competition	<p>Enter one of the following ONLY when 26 is Y for “Yes.”</p> <p>A. <i>Unique Source</i> — Use if the action was justified pursuant to FAR 6.302-1(b)(1).</p> <p>B. <i>Follow-on Contract</i> — Use if the action was justified pursuant to FAR 6.302-1(a)(2)(ii).</p> <p>C. <i>Unsolicited Research Proposal</i> — Use if the action was justified pursuant to FAR 6.302-1(a)(2)(i).</p> <p>D. <i>Patent/Data Rights</i> — Use if the action was justified pursuant to FAR 6.302-1(b)(2).</p> <p>E. <i>Utilities</i> — Use if the action was justified pursuant to FAR 6.302-1(b)(3).</p> <p>F. <i>Standardization</i> — Use if the action was justified pursuant to FAR 6.302-1(b)(4).</p> <p>G. <i>Only One Source – Other</i> — Use if the action was justified pursuant to FAR 6.302-1 in a situation other than the examples cited in A through F above.</p> <p>H. <i>Urgency</i> — Use if the action was justified pursuant to FAR 6.302-2</p> <p>J. <i>Mobilization</i> — Use if the action was justified pursuant to FAR 6.302-3(a)(2)(i).</p> <p>L. <i>International Agreement</i> — Use if the action was justified pursuant to FAR 6.302-4.</p> <p>M. <i>Authorized by Statute</i> — Use if the action was justified pursuant to FAR 6.302-5(a)(2)(I). This includes actions under the SBA 8(a) Program that are sole source pursuant to FAR 6.302.5(b)(4).</p> <p>N. <i>Authorized for Resale</i> — Use if the action was justified pursuant to FAR 6.302-5(a)(2)(ii).</p> <p>P. <i>National Security</i> — Use if the action was justified pursuant to FAR 6.302-7 Public Interest.</p> <p>Q. <i>Public Interest</i> — Use if the action was justified pursuant to FAR 6.302-7 Public Interest.</p>
28	Number of Offers Received	<p>Enter the appropriate code from the following choices:</p> <p>A. 1, B. 2–5, C. 6–10, D. 11–15, E. 16–20, F. 21–50, G. over 50. (See the corresponding block on the SF 279 for the base contract.)</p>
29	Extent Competed	<p>Use one of the following when the conditions apply. (See corresponding blocks on the SF 279 for the base contract.)</p> <p>A. <i>Competed Action</i> — Use when Fully and Openly Competed</p> <p>B. <i>Not Available for Competition</i> — Use for utilities, brand name commercial products for authorized resale, procurements authorized or required by statute, sole source 8(a), or other contract actions where the agency has determined that there is no opportunity for competition.</p> <p>C. <i>Follow-On to Competed Action</i> — Use when the action pertains to an acquisition placed with a particular contractor to continue or augment a specific competed program where such placement was necessitated by prior acquisition decisions.</p> <p>D. <i>Not Competed</i> — Use when A, B, or C do not apply.</p>

Field Number	Description	Contents
30	Type of Contractor	<p>Enter the appropriate code. (See corresponding blocks on the <i>SF 279</i> for the base contract.) DO NOT LEAVE BLANK.</p> <p>A. <i>Small Disadvantaged Business</i> — Use for an award to a small disadvantaged business concern as defined in <i>FAR 19.001</i>.</p> <p>B. <i>Other Small Business</i> — Use for an award to a small business concern as defined in <i>FAR 19.001</i> when Code A does not apply.</p> <p>C. <i>Large Business</i> — Use for an award to a concern that is not a small business concern or an individual.</p> <p>D. <i>JWOD Non-Profit Agency</i> — Use for an award to a workshop for the blind or for the other severely handicapped persons as defined in <i>FAR 8.701</i>.</p> <p>E. <i>Nonprofit Educational Organization</i> — Use for an award to an educational organization neither organized for profit nor owned by a state or local government.</p> <p>F. <i>Nonprofit Hospital</i> — Use for an award to a hospital neither organized for profit nor owned by a state or local government.</p> <p>G. <i>Other Nonprofit Organization</i> — Use for an award to any other organization that is neither organized for profit nor owned by a state or local government, including research organizations.</p> <p>H. <i>State/Local Government – Educational</i> — Use for an award to a state-owned or locally-owned educational organization</p> <p>J. <i>State/Local Government – Hospital</i> — Use for an award to a state-owned or locally-owned hospital</p> <p>K. <i>Other State/Local Government</i> — Use for an award to any other organization that is part of a state or local government, including state or local research organizations</p> <p>L. <i>Foreign Contractor</i> — Use for an award to a source outside the U.S. and its outlying areas or if the award is to a foreign government (or any agency or instrumentality thereof).</p> <p>M. <i>Domestic Contractor Performing Outside U.S.</i> — Use for an award to a source inside the U.S. and its outlying areas, but where the principal place of performance will be outside the U.S. and its outlying areas.</p> <p>N. <i>Historically Black College/University or Minority Institution (HBCU/MI)</i> — Use for an award to a source identified as an institution determined by the Secretary of Education to meet the requirements of <i>34 CFR 608.2</i>. “Minority Institution” means an institution of higher education meeting the requirements of Section 1046(3) of the <i>Higher Education Act of 1965</i>.</p>
31	Woman-Owned Business	Enter the appropriate code. Choose Y for “Yes” or N for “No.”

When you have finished entering the data on this screen, click on the next tab at the top of the screen to view *Screen 32-33*.

Screen 32-33

Field Number	Description	Contents
32	HUBZONE Small Business Concern	
33a	HUBZone Program	
33b	Small Disadvantages Business Programs	
33c	Other Preference Programs	Enter the appropriate code for the program for which the Solicitation was set-aside. (See corresponding blocks on the <i>SF 279</i> for the base contract.) DO NOT LEAVE BLANK. A. Directed to a JWOD Nonprofit Agency B. 8(a) Contract Award C. Reserved D. Small Business Set-Aside E. Reserved F. Reserved G. Buy Indian/Self Determination H. No Reference Program or Not Listed J. Small Disadvantaged Business Set-Aside
33d	HUBZone Price Evaluation Preference Price Difference	
33e	SDB Price Evaluation Adjustment Percent Difference	

When you have finished entering the data on this screen, click on the next tab at the top of

the screen to view *Screen 34-41*.

Screen 34-41

The screenshot shows a window titled "SF279" with a tabbed interface. The "34 To 41" tab is selected. The fields are as follows:

- 34. Subcontracting Plan: A dropdown menu with a blue background.
- 35. Subject to Labor Statutes: A dropdown menu.
- 36. Estimated Contract Completion Date: A text box containing "12/30/2000".
- 37. Contractor's TIN: A text box containing "420845038".
- 38. Common Parent's Name: A text box.
- 39. Common Parent's TIN: A text box.
- 40. Reserved: A text box.
- 41. Reserved: A text box.

At the bottom of the window are four buttons: OK, Cancel, Apply, and Help.

Screen Number	Description	Contents
34	Subcontracting Plan	Enter the appropriate code. (See the corresponding block on the <i>SF 279</i> for the base contract.) A. <i>Required</i> — Use if the contract contains a subcontracting plan. B. <i>Not Required</i> — Use if the contract does not contain a subcontracting plan.
35	Subject to Labor Statutes	Enter the appropriate code. (See the corresponding block on the <i>SF 279</i> for the base contract.) A. Subject to Walsh-Healey Act C. Service Contract Act D. Davis-Bacon Act E. Not Subject to Walsh-Healey, Davis-Bacon, or Service Contract Acts
36	Estimated Contract Completion Date	EAS displays the expiration date from the “Admin Screen” of the Award Administration Tab Control Screen. Enter the current contract completion date. Note: If the purpose of the modification is to extend the contract completion date, enter the new date here.
37	Contractor’s TIN	Pulled from the bidder record in the master bidders’ list.
38	Common Parent’s Name	Data displays from the Vendor file if a common parent is applicable.
39	Common Parent’s TIN	Data displays from the Vendor file if Item 37 is applicable.
40	Reserved for FPDS	Not applicable

Screen Number	Description	Contents
41	Reserved for FPDS	Not applicable

When you have finished entering the data on this screen, click on the next tab at the top of the screen to view *Screen 42–49*.

Screen 42-49

The screenshot shows the SF279 application window. At the top, there are tabs for different sections: '1 To 8', '9 To 16', '17 To 23', '24 To 31', '32 To 33', '34 To 41', '42 To 49', and 'Reports'. The '42 To 49' tab is currently selected. Below the tabs, the following fields are visible:

- 42. Demonstration Program: A dropdown menu with a blue selection.
- 43. Emerging Small Business: A dropdown menu.
- 44. Emerging Small Business Reserve Award: A dropdown menu.
- 45. Size of Small Business: A dropdown menu.
- 46. Reserved for FPDS: A text field.
- 47. Optional Reported Data Elements: A text field.
- 48. For Agency Internal Use: A text field.
- 49 Contracting Officer or Rep.: A text field containing 'SA1' with a search icon, and a 'Submitted:' date field containing '10/25/1999'.

At the bottom of the window, there are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.


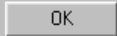
Screen Number	Description	Contents
42	Demonstration Test Program	Does not apply to contract actions under the Federal Schedule Program. Choose “Yes” or “No.” (See the corresponding block on the <i>SF 279</i> for the base contract.) Y (Yes) — Use for any contract action awarded to U.S. business concerns as a result of a Solicitation issued on or after 1/1/89 under the Demonstration Test Program for the designated industry groups or the targeted industry categories. N (No) — Use when the above does not apply.
43	Emerging Small Business	Enter a code only if Item 42 is “Yes” or if the contractor represents that it is an emerging small business. Otherwise, leave blank. (See the corresponding block on the <i>SF 279</i> for the base contract.)

Screen Number	Description	Contents
44	Emerging Small Business Reserved Award	Enter a code only if Item 43 is “Yes” or if contract actions (including modifications) resulted from an award reserved for emerging small business concerns. Otherwise, leave blank. (See the corresponding block on the <i>SF 279</i> for the base contract.)
45	Size of Small Business	Enter a code if the award is to a small business concern or Item 42 is “Yes.”
46	Reserved for FPDS	Not applicable
47	Optional Reported Data Elements	Not applicable
48	For Agency Internal Use	Not applicable
49	Contracting Officer	Enter the three-letter EAS ID of the contracting official who will sign the <i>SF 279</i> . (EAS defaults to previously entered information.)
	Submitted	Enter the estimated date the modification is being submitted.

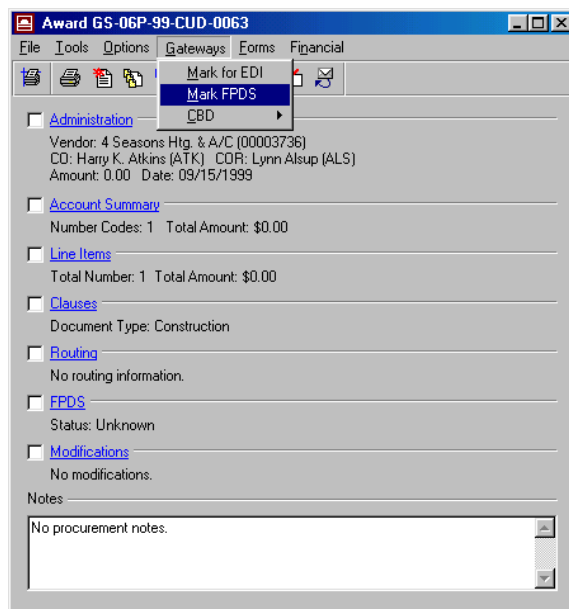
Screen Reports

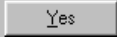
Click on the “*Update Edit Report*” button to display a report reflecting any corrections made. If errors are still listed, continue to make corrections and click on the “*Update Edit Report*” button until the message reads “No errors found! SF 279 passes edit checks.” Click on the “Print 279” button and then click on the button. The *SF 279* will print to the Windows printer.

Note: Review the *SF 279* to ensure that all data is correct and that no required fields are left blank.

Once the *SF 279* is correct, click on the  icon in the upper right-hand corner of the screen to return to the *SF 279 Reports Screen* and click  to return to the *Award Summary Screen* will appear.

Award Summary Screen



At the *Award Summary Screen*, click on "Gateways" on the menu bar, then select "Mark FPDS" from the drop-down menu to mark the award for export. When the *Information Dialogue Box* appears, click on the  button to return to the EAS Desktop.


Modifications



SF 279 Tab Control Screen

From the *Modification Management Summary Screen*, click on the "FPDS" hypertext link. The *SF 279* screen will appear.

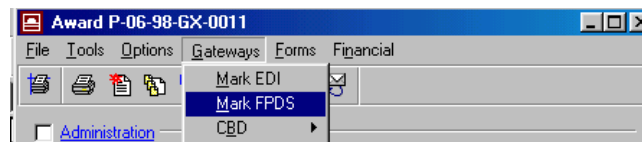
Most blocks on modification *SF 279* will be completed with data from the base award. However, the following areas demand special consideration:

Block 6 (Action Date):	Defaults to current date. Enter the estimated date the modification will be awarded.
Block 9 (Kind of contract action):	Should be "H" for most types of modifications, "G" for modifications to Federal Supply Schedule orders.
Block 10 (Dollars Obligated or Deobligated):	Should be the dollars obligated or deobligated on the CURRENT MODIFICATION, rounded to the nearest thousand. Example: If you are obligating \$22,500.00, block 10 should read "00000023."
Block 35 Estimated Completion date:	Revised completion date inclusive of the current modification.


It is good practice to have the *SF 279* for the base contract handy when you are completing these screens. EAS automatically fills in any numbers that are “skipped.” Be sure to press the  button between screens.

Once the *SF 279* is correct, click on the  in the upper right-hand corner of the screen to return to the *SF 279 Reports Screen*. Click the  button and the *Award Summary Screen* will appear.

Award Summary Screen



At the *Award Summary Screen*, click on "Gateways" on the menu bar, then select "Mark FPDS" from the drop-down menu to mark your award for export. An *Information Dialogue Box* will appear. First click "File" and then "Print Setup" A *Print Preview Screen* will appear.

At the *Award Summary Screen*, click the  in the upper right-hand corner of the screen to return to the *Purchasing Worksheet*.

To exit EAS, close the *Purchasing Worksheet*. At the EAS desktop, choose "File" and then "Close."